

## Definitions

Accounts Management Customer Satisfaction (adjustments)	Total percentage of 4 or 5 ratings (top boxes) given by taxpayers on the Adjustment Customer Satisfaction Survey question rating overall satisfaction.
Automated Collection System (ACS) Accuracy	The percent of taxpayers who receive the correct answer to their ACS question.
Automated Underreporter (AUR) Customer Satisfaction – Small Business/Self-Employed (SB/SE)	Total percentage of 4 or 5 ratings (top boxes) given by taxpayers on the Adjustment Customer Satisfaction Survey question rating overall satisfaction.
Automated Underreporter (AUR) Customer Satisfaction – Wage & Investment (W&I)	Total percentage of 4 or 5 ratings (top boxes) given by taxpayers on the Adjustment Customer Satisfaction Survey question rating overall satisfaction.
Automated Underreporter (AUR) Efficiency	The total number of W&I and SB/SE contact closures (a closure resulting from a case where IRS made contact) divided by the total full-time equivalents (FTEs), including overtime.
Automated Underreporter (AUR) Coverage	A percentage representing the total number of Wage & Investment (W&I) and Small Business/Self-Employed (SB/SE) contact closures (a closure resulting from a case where SB/SE and W&I made contact) divided by the total return filings for the prior year.
Automated Underreporter (AUR) Telephone Level of Service	The percentage of AUR phone calls answered by a tax examiner as a percentage of the total calls attempted.
Collection Coverage - Units	The volume of collection work disposed compared to the volume of collection work available.
Collection Efficiency - Units	The sum of all modules disposed by Automated Collection System (ACS) (SB/SE & W&I) and by SB/SE field collection divided by the total collection FTEs.
Compliance Services Collection Operation (CSCO) Customer Satisfaction – Small Business/Self-Employed (SB/SE)	Total percentage of 4 or 5 ratings (top boxes) given by CSCO Customer Satisfaction Survey question rating overall satisfaction.
Compliance Services Collection Operation (CSCO) Customer Satisfaction – Wage & Investment (W&I)	Total percentage of 4 or 5 ratings (top boxes) given by CSCO Customer Satisfaction Survey question rating overall satisfaction.
Compliance Services Collection Operation (CSCO) days to close – Business	This measure is used to determine average time to close a case in CSCO, based on its receipt date.
Compliance Services Collection Operation (CSCO) days to close – Individual	This measure is used to determine average time to close a case in CSCO, based on its receipt date.
Conviction Efficiency Rate (\$)	The cost of Criminal Investigation's program divided by the number of convictions.
Conviction Rate	The percent of adjudicated criminal cases that result in convictions.

  

Correspondence Error Rate with Systemic Errors (New measure for FY08)	Rate of performance that measures the percentage of incorrect Submission Processing Masterfile notices and letters issued to taxpayers by the IRS.
Correspondence Exam Customer Satisfaction – Small Business/Self-Employed (SB/SE)	Total percentage of 4 or 5 ratings (top boxes) given by Correspondence Exam Customer Satisfaction Survey question rating overall satisfaction.
Correspondence Exam Customer Satisfaction – Wage & Investment (W&I)	Total percentage of 4 or 5 ratings (top boxes) given by Correspondence Exam Customer Satisfaction Survey question rating overall satisfaction.
Cost per Taxpayer Service \$(Health Care Tax Credit)	The costs associated with serving the taxpayers including program kit correspondence, registration and program participation

Criminal Investigations Completed	The total number of subject criminal investigations completed during the fiscal year, including those that resulted in prosecution recommendations to the Department of Justice as well as those discontinued due to a lack of prosecution potential.
Customer Accuracy – Customer Accounts (phones)	The percentage of correct answers given by a live assistant on toll-free account inquiries.
Customer Accuracy – Tax Law Phones	The percentage of correct answers given by a live assistant on toll-free tax law inquiries.
Customer Contacts Resolved per Staff Year	The number of customer contacts resolved in relation to staff years expended.
Customer Service Representative (CSR) Level of Service	The number of toll-free callers that either speak to a Customer Service Representative or receive informational messages divided by the total number of attempted calls.
Deposit Error Rate – Combined	The percentage of errors made at the Submission Processing sites during remittance processing. These errors result in the inaccurate processing of data and may have a negative impact on the taxpayer.
Employee Plan Determination Letters Timeliness (days)	Average number of days to process an application requesting qualified status from the earlier of the postmark date or the received date to the date a determination letter is issued to the requesting plan.
Exam Timeliness – Coordinated Industry Cases (CIC) and Industry Cases (IC) combined (months)	The average number of months from file date to completion of the examination process for all IC and CIC returns closed during the prior twelve months.

Examination Coverage – Business (Corps.>\$10 M)	The number of Large- and Mid-Sized Business (LMSB) “customer base” returns (C and S Corporations with assets over \$10 million and all partnerships) examined and closed by LMSB during the current fiscal year divided by the number of filings for the preceding calendar year.
Examination Coverage – Individual (1040)	The sum of all individual 1040 returns closed by Small Business/Self Employed (SB/SE), Wage & Investment (W&I), and Large and Mid-Sized Business (LMSB) (Field Exam and Correspondence Exam programs) divided by the total individual return filing for the prior calendar year.
Examination Efficiency – Individual (1040)	The sum of all individual 1040 returns closed by SB/SE, W&I, and LMSB (Field Exam and Correspondence Exam programs) divided by the total full-time equivalent (FTE) expended in relation to those individuals returns.
Examination Quality – Coordinated Industry	Average of the scores of coordinated industry cases reviewed. Case scores are based on the percentage of elements passed within each auditing standard.
Examination Quality – Industry	Average of the scores of industry cases reviewed. Case scores are based on the percentage of elements passed within each auditing standard.
Exempt Organization (EO) Determination Customer Satisfaction	The percentage of EO determination customers expressing a 6 or 7 on a transactional survey where respondents rate IRS performance on a scale from 1 for “Very Dissatisfied” to 7 “Very Satisfied.”
Exempt Organization Determination Letters Timeliness (days)	Average number of days to process an application requesting tax-exempt status from the earlier of the postmark date or the received date to the date a determination letter is issued to the requesting organization.

Field Collection Customer Satisfaction	Customers' overall satisfaction with their Field Collection experience rated as a percentage satisfied.
Field Collection National Quality Review System (NQRS)	The score awarded to a reviewed collection cases by a quality reviewer using the NQRS quality attributes.
Field Exams Customer Satisfaction	Customers' overall satisfaction with their Field Exams experience rated as a percentage satisfied.
Field Exam National Quality Review System	The score awarded to a reviewed field examination case by a Quality Reviewer using the National Quality Review System (NQRS) quality attributes.
Internal Customer Satisfaction - Modernization & Information Technology Services (MITS)	Overall customer satisfaction percentage for MITS.
Number of Convictions	The number of criminal convictions

Office Exam National Quality Review System (NQRS)	The score awarded to a reviewed office examination case by a Quality Reviewer using the NQRS quality attributes.
Percent Business Returns Processed Electronically	The percentage of electronically-filed business tax returns divided by the total business returns filed.
Percent of Business Systems Modernization (BSM) Projects within +/- 10% Cost Variance	Percent variance by release/sub-release of a BSM funded project's initial, approved cost estimate versus current, approved cost estimate.
Percent of Business Systems Modernization (BSM) Projects within +/- 10% Schedule Variance	Percent variance by release/sub-release of a BSM funded project's initial, approved schedule estimate versus current, approved schedule estimate.
FISMA Systems with Valid Authority to Operate (ATO)	A system is considered compliant when it has successfully completed security and accreditation.
Percent of Eligible Taxpayers Who File for Earned Income Tax Credit (EITC)	The number of taxpayers who claim the EITC compared to the number of taxpayers who appear to be eligible for the EITC.
Percent Individual Returns Processed Electronically	The percentage of electronically-filed individual tax returns divided by the total individual returns filed.
Percentage of Managers Receiving Leadership Training Timely (HCO)	Frontline managers within nine months of effective date and Department and Senior managers within one year of effective date.
Percentage of Mission Critical Positions Hires Achieved (HCO)	Frontline managers within nine months of effective date and Department and Senior managers within one year of effective date.
Percentage of Offers in Compromise (OIC) Field closed in less than nine months	The percentage of cases that were disposed in nine months or less than were worked compared to the number of OICs that were received.
Practitioner Toll-Free Customer Satisfaction	Total percentage of 4 or 5 ratings (top boxes) given by taxpayers on the toll-free or PPS Customer Satisfaction Survey question rating overall satisfaction.
Primary Abandoned Call Rate	Rate of performance that measures the percentage of callers who abandon the AT&T network before reaching an IRS system.
Real Estate Portfolio Cost – Agency-wide Shared Services (AWSS)	Real estate portfolio cost is the percentage increase of total rent cost over the prior year.
Refund Timeliness – Individual (Paper)	The percentage of refunds resulting from processing individual Master File paper returns issued within 40 days or less.
Secondary Abandoned Call Rate	Rate of performance that measures the percentage of callers who abandon in the assistor queue.

Sign-up Time (days) – Customer Engagement (HCTC)	The length of time between the first Program Kit mailing and first payment received.
Small Business/Self-Employed (SB/SE) Correspondence Exam Cycle Time Earned Income Tax Credit (EITC)(days)	Average number of calendar days from the start of an SB/SE EITC examination (status 10 or higher) to closure. Bankruptcy cases, disaster area cases, and non-AIMS closures (i.e.: audit reconsiderations) are excluded from this calculation.
Small Business/Self-Employed (SB/SE) Correspondence Exam Cycle Time (non-EITC)(days)	Average number of cycle days from the start of a discretionary examination to closure of non-EITC cases.
Tax Exempt/Government Entities (TE/GE) Determination Case Closures	The number of cases closed in the Employee Plans or Exempt Organizations Determination programs, regardless of type of case or type of closing.
Taxpayer Self Assistance Rate	The percentage of taxpayer assistance requests resolved using self-assisted automated services.
Timeliness of Completed Service Calls – Modernization & Information Technology Services (MITS)	Amount of time spent to resolve issue raised by service call to MITS.
Timeliness of Critical Filing Season Tax Products to the Public	The percentage of critical filing season tax products (tax forms, schedules, instructions, publications, tax packages, and certain notices required by a large number of filers to prepare a complete and accurate tax returns) available to the public in a timely fashion.
Timeliness of Critical Tax Exempt/Government Entities (TE/GE) & Business Tax Products to the Public	Percentage of critical other tax products, paper and electronic, available to the public in a timely manner.
Wage & Investment (W&I) Average Wait Time on Hold (in seconds)	A measure of the average number of seconds customers waited in an assistor queue before receiving service.
Wage & Investment (W&I) Service Center Correspondence Exam Timeliness (discretionary)(days)	Average calendar days from the initiation of an examination or correction contact to closure.
Wage & Investment (W&I) Service Center Correspondence Exam Timeliness (EITC)(days)	Average calendar days from the initiation of an examination or correction contact to closure.